



**CITY OF DURHAM | NORTH CAROLINA**

**Date:** July 21, 2011

**To:** Mayor and City Council

**From:** Thomas J. Bonfield, City Manager

**Through:** Wanda S. Page, Deputy City Manager  
Bertha Johnson, Budget and Management Services Director  
Jay Reinstein, Strategic Initiatives Manager

**Subject:** Demonstration of Performance Management System (dashboard)

### **Executive Summary**

In 2008, the City of Durham identified a need for the development of a strategic plan to set direction for the future of the city and guide decision-making. The resulting plan translates the community's vision and City Council's goals into actions by the City organization, enabling the organization to better serve the community. The City Council adopted the Strategic Plan at its April 18 meeting.

A key component of the Strategic Plan is the Performance Management System dashboard. The Performance Management System is a tool to highlight progress made on citywide measures and goal initiatives and to identify positive and correct negative trends. This software will allow management to monitor the contribution of City departments and to gauge how well we are doing as an organization. It will enable management to capture and report specific data from each department, thus providing a "snapshot" of performance to our citizens. A semi-annual report will be published, for our citizens, highlighting the progress made on the measures associated with the five Council goals.

Another element of this process is the creation of the Citizens Oversight Committee. This committee, a cross-section of Durham residents, is composed of volunteers from the Citizen Engagement Workshop from February 2011. This committee has been instrumental with the design and functionality enhancement recommendations on the Performance Management System. These twelve citizens have been meeting with City staff on a bi-weekly basis, since March 2011, in an effort to create, through a unique partnership, a dashboard that serves the needs of our very diverse and engaged community.

### **Recommendation**

The administration recommends that City Council:

- Receive a demonstration and provide feedback on the Performance Management System dashboard.

## **Background**

In 2008, the City of Durham identified a need for the development of a strategic plan to set direction for the future of the city and guide decision-making. The resulting plan translates the community's vision and City Council's goals into actions by the City organization, enabling the organization to better serve the community. The City Council adopted the Strategic Plan at its April 18 meeting.

A key component of the recently adopted Strategic Plan is the Performance Management System dashboard. The Performance Management System is a tool to highlight progress made on citywide measures and goal initiatives and to identify positive and correct negative trends. This software will allow management to monitor the contribution of City departments and to gauge how well we are doing as an organization. It will enable management to capture and report specific data from each department, thus providing a "snapshot" of performance to our citizens.

In November 2010, Budget and Management Services and Technology Solutions staff demonstrated several software options with ClearPoint/Ascendant selected to support the City's Performance Management System initiative based on their experience in the public sector, software capabilities, and pricing structure.

In February 2011, ClearPoint/Ascendant provided training to twelve staff enabling them to input City data and create charts and graphs. Later in the month, Budget and Management Services along with Technology Solutions staff conducted a Citizen Engagement Workshop involving forty citizens, an opportunity to provide an update on the Strategic Plan as well as to solicit input on the design and functionality of the Performance Management system. During the break-out sessions, some suggested features were identified by the citizens that include the need to have printable reports, easy to understand charts and graphs, drill-down capabilities, analyses, trending information, and why a specific measure matters. At the conclusion of the workshop, twelve citizens signed up to participate on the Citizens Oversight Committee, charged with assisting staff with the design and functionality assessment, through beta testing, of the Performance Management System.

The Citizens Oversight Committee began meeting in March 2011 and will continue meeting bi-weekly with staff until the Performance Management System "goes-live" in late July 2011. Following the implementation of the Performance Management System, the committee has agreed to meet bi-monthly to assess the system and to offer input on the process moving forward.

## **Issues/Analysis**

Based on research and benchmarking, a Performance Management System will provide the following benefits for the organization:

- Increase and improve outreach to the residents of Durham;
- Provide a "snapshot" of performance to residents;
- Highlight progress made on citywide measures and initiatives;
- Identify areas that may require additional resources;
- Identify positive trends;
- Identify negative trends;

- Allow management to monitor the contribution of departments; and
- Gauge effectiveness of the organization

**Alternatives**

The City Council can choose to delay the debut of the Performance Management System until additional enhancements are implemented.

**Financial Impact**

There is no financial impact.

**SDBE Summary**

This item is to receive a demonstration on the Performance Management System dashboard. It was not reviewed by the Department of Equal Opportunity/Equity Assurance for compliance with the Ordinance to Promote Equal Business Opportunities in City Contracting.